FOOD AND AGRICULTURAL INDUSTRIES

This collective term covers a wide range of activities that are more or less industrial and are covered by rubrics 411-429 used by the O.N.S.S. (Office National de Securité Sociale) in their "NACE nomenclature adapted to Belgian needs and of O.N.S.S." (code NACE, latest version dating back to February 1993).

The employment data provided by O.N.S.S. for the 30th June 1992 form the basis for these maps and were the most recent at the time these maps were drawn. These data give relevant detailed economic and social information at the commune level for the analysis of this industry by sub sections.

All the enterprises (including the smallest enterprises with fewer than 20 employees) have been dealt with on all the maps, except for Map 1, so that the picture is virtually complete.

At the 30th June 1992 food and agricultural industries in Belgium accounted for 7112 enterprises employing a total of 93 883 persons (10% of the secondary sector, including construction). This employment was at that time distributed in the three Regions as follows: Flanders 65 677 persons (69.9%), Wallonia 20 784 (22.1%), Brussels Region 7422 (8.0%).

Agricultural industries are strongly represented in Flanders, reflecting the advantage of this area in the national total industrial sector (in the middle of 1992, 66.8% of Belgian industrial employment was located in Flanders). Only the production of mineral water predominates in Wallonia. Even the majority of employment in the sugar industry is in Flanders.

Employment in this branch of industrial activity (Map 2) which is based for the most part on raw or primary agricultural products is nevertheless more urban than rural.

The five largest urban regions form more than 30% of the employment: in the Brussels region, about 13000 (of whom 7422 in the 19 communes), the urban region of Antwerp accounts for almost 9000 (3397 in Antwerp alone), the Liège region just under 3000 (almost entirely in Liège), the Ghent region 3500 (Ghent 2346) and the Charleroi region more than 1100. With regard to other centres where more than 1000 are employed, it would appear that the high figure is due to sub sectors with strongly developed specialisms or sometimes by a single large enterprise: Louvain (2493: brewing), Herentals (2474: biscuits, chocolate and confectionery), Aalst (1328: starch products), Izegem (1328: oil) as also Turnhout (1111), Veurne (1069), Bruges (1062). With a few exceptions (for example Ruiselede, Ardooie, Langemark) there are few truly rural communes with raised employment figures.

The third general characteristic is this: apart from the great urban agglomerations and in some other towns, the number of sub sectors significantly represented (more than 5% of the employment; concerning enterprises of 20 employees or more - Map 1) is quite small. In Antwerp, Ghent and in the Brussels-Capital region there are 8 sub sectors, in Liège and Charleroi 5. On the other hand there are 6 at Courtrai and Roeselare, 6 at Turnhout, 5 at Bruges and Waregem. Occasionally in certain large centres of employment, there is a sub sector which strongly predominates: for example Kontich (610; 90.5% in brewing), Kasterlee (574; 94.8% chocolate and confectionery), Vilvoorde (679; 84.1% biscuits, etc.), Tienen (730; 100% sugar), Spa (583; 100% mineral water), Namur (906; 93.4% milk products), Lebbeke (803; 82.7% chocolate and confectionery), Deinze (748; 80.9% animal foodstuffs), Beveren (735; 80.5% biscuits, etc.), Ardooie (663; 84.9% fruit and vegetable preservation and conservation). In the other employment centres, the number of sub sectors worthy of mention (more than 5%) is generally limited to one or two.

The two large centres of **cooking fats and oil production** (Map 3) are Izegem (with Lichtervelde and Staden) and Antwerp, continuing the long history of the oil industries, the one mainly in connection with local raw materials and the other with raw materials imported via the port.

The **sugar industry** (Map 3) is situated close to the areas of sugar beet production of the limon region (Tienen, Oreye, Brugelette, Brunehaut) and the polders (Moerbeke and Veurne).

Abattoirs and the industries associated with meat products (butchers and cooked meats not included) (map 4) are widespread; they are more numerous in Flanders than in Wallonia, where the larger enterprises are lacking, apart from the Liège region. The larger enterprises are either abattoirs or those of meat preparations. Abattoirs are found in towns (such as Antwerp, Brussels, Ghent) where they are sited close to the consumers and in the country (for example Aubel and Sint-Lievens-Houtem) near areas of intensive cattle-rearing. Meat preparation enterprises such as those at Schoten, Wommelgem or Waarschoot are mainly developed near the abattoirs. The centres of gravity are in Western Flanders and around Ghent in Eastern Flanders.

Fish processing (map 4) logically has its principal centre at the coast, particularly close to the port of Ostend.

The **milk or dairy industry** (Map 5) encompasses milk products as well as that of classic dairies. These do not number as many undertakings as formerly, there having been a considerable concentration of enterprises. It is best represented in Eastern Flanders (Aalter, Evergem), in the grassland region around Liège (Limbourg, Dison), the centre of Limburg (Lummen, Zonhoven). But it is not entirely absent elsewhere (Namur). Enterprises specifically concerned with milk products are also located in the proximity of the large cities (centres of consumption).

More than half of the **forage industries** (Map 6) (the manufacture of animal fodder) are traditionally to be found in both Western and Eastern Flanders, particularly in the region of the Lys and the Mandel (Deinze, Roeselare, Wielsbeke) where there is a strong relationship between this industry and intensive cattle rearing. Elsewhere there are also animal fodder enterprises in the Antwerp port region, where the primary raw material is here imported.

The **tobacco industry** (Map 6) practically no longer exists in the classic areas of tobacco cultivation. The manufacture of cigarettes is concentrated in the large enterprises in the main consumption centres (Brussels, Antwerp, Liège) and Louvain. In the 19th century the manufacture of cigars became located in the Campine (Geel, Houthalen, Overpelt a.o.), having come from North Brabant.

As to the **production of alcoholic spirits and similar connected products** (Map 6) the one single important establishment that remains is in Bruges. Moreover, there are some isolated sites (like Ghent or Zonhoven) or specialised (like Thimister and Aubel).

The **preservation and conservation of fruit and vegetables** (Map 7) is concentrated in the Malines market gardening region (Sint-Katelijne-Waver, Malines a.o.), the Antwerp region (e.g. Grobbendonk), the northern Campine of Limburg (e.g. Bree), the horticulture region of central West Flanders (Kortemark, Staden, Ardooie a.o.), the regions of fruit cultivation (Sint-Truiden): the link with the production of the raw materials is obvious. Floreffe is an isolated case.

Flour and derived products (Map 8) are above all products of small enterprises dispersed over the whole country. The largest, like Aalst (starch products) and Roeselare (pasta) belong to the derived products. Antwerp (import of the raw materials) is of course not unimportant.

The **manufacture of bread and similar products** (biscuits, cakes, etc.) is a particularly expanding branch (Map 9). There are only about fifty communes where less than five persons are employed. This group includes also bakeries which in the great majority are not industrialised; these enterprises serve the needs of the local population. There are a limited number of enterprises which are clearly industrial, but it is these large enterprises which comprise the main workforce, for example, at Herentals, Roeselare, Vilvoorde, Nivelles, Verviers, Halle, Ninove, Tournai, Morlanwelz, Zaventem, Blégny, Beveren, Kaprijke. The location factors for these are quite divergent.

Cocoa, chocolate, chocolate products and confectionery (Map 10) are the products of only a small number of enterprises but in general these are large. There is a strong concentration in the Antwerp province (particularly so in Campine, less in the Antwerp region itself) and in the Brussels region. The import of the raw materials and the markets are the most important factors of location. Elsewhere, one can note a certain number of isolated cases with a large establishment such as Arlon, Eupen, Lebbeke, Manage, Langemark together with Bruges, Ghent, Sint-Niklaas, Liège ... with several smaller establishments.

The distribution of **breweries and maltings** (Map 11) is the result of an evolution of several decennia of concentration. This is what now remains: two very large breweries at Louvain and Liège, a concentration of large and small breweries (often specialised) in the quadrilateral Antwerp-Aalst-Brussels-Louvain (other centres Kontich, Boortmeerbeek, Malines, Londerzeel, Sint-Jans-Molenbeek, Puurs, Oudergem): several isolated cases like Alken, Hoegaarden: several more modest centres in Western and Eastern Flanders and several breweries related to abbeys, the so-called abbatical breweries.

The centres of production of **mineral water and soft drinks** (Map 12) can be classed into two groups. Mineral water is mainly provided by Spa and Chaudfontaine together with a number of smaller centres of production in the Liège region and the south of Eastern Flanders; the link with the raw material is very evident. The production of soft drinks is linked to the major concentrations of population such as Brussels, Antwerp, Ghent, Hasselt-Genk, Charleroi. Sometimes there is a link with fruit production (e.g. Borgloon).

The group **"other activities"** (Map 13) includes heterogeneous activities such as roasting works (e.g. in the Antwerp region), chicory factories, vinegar distilleries, ice works, diet foods and baby foods, spices, seasonings, sauces, etc. A general rule for their distribution cannot be logically provided. Isolated enterprises such as those at Veurne, Leuze-en-Hainaut, Grimbergen, Dilbeek, Vorst, Puurs, Bornem, Schoten and Aartselaar each have their own individual and different explanation.